

An Investigation of the  
Marketing of Sawn Timber  
by Distribution Outlets  
in Christchurch.

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26 October, 1990.

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## Abstract

An investigation of the Christchurch sawn timber market was conducted to determine the marketing strategies used by retail companies to service each of the market segments.

Market segments were identified as being home handyman (DIY), trade, industrial, joinery and renovation according to their individual requirements.

A survey was conducted which found that the larger companies were often cheaper, but price was not the most important consideration in successful timber marketing. Service was found to be as important, along with presentation and promotion. Those companies offering lower prices generally offered lower levels of service. Placemakers for example was more expensive than average, but offered better service than most other companies.

Retail companies were ranked in order of price for each of the market segments, and were ranked in order of the service they offered. These rankings were combined to give a ranking of overall marketing effectiveness.

The home handyman and the trade segments are well serviced in Christchurch by the retailers, but the industrial and joinery segments were often dealing directly with sawmillers due to the

volume and nature of their requirements. The renovation industry was not so well catered for.

It is predicted that the demands of the sawn timber market will cause smaller retailers to close down, while larger companies will need to diversify in order to maintain or increase their market share.

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## **1.0 Introduction**

This dissertation looks at sawn timber marketing within Christchurch city. There are a lot of companies operating in this relatively small area, so competition for business is rather intense. It is clear that there are several distinct timber market segments, so these will first be identified.

This investigation takes the view that Placemakers (Fletcher Merchants Ltd.) is a successful timber marketing operation, and then surveys nine opposition companies to find what market segments are being serviced by which companies, and what marketing strategies are being employed to service those market segments.

It may then be possible to speculate what future direction the industry may take.

## 2.0 Christchurch Sawn Timber Market

### 2.1 Extent of the Market

It is possible to gain some idea of the extent of the market by having a look at the number of building permits issued in Christchurch each year, what they were issued for, and the estimated value of the projects. The following figures were compiled from figures obtained from the Christchurch City Council.

	<u>1990</u>		<u>1989</u>	
	<u>Permits</u>	<u>(\$000,000)</u>	<u>Permits</u>	<u>(\$000,000)</u>
Residential;				
New:	464	(56.8)	313	(36.5)
Additions & Alterations:	1527	(12.3)	1725	(11.0)
Accessory Buildings:	943	(5.2)	984	(5.0)
Non-residential:	<u>86</u>	<u>(9.5)</u>	<u>110</u>	<u>(29.2)</u>
Total:	3020	(83.9)	3123	(81.6)
Commercial;				
New:	25	(20.5)	13	(47.2)
Additions & Alterations:	<u>155</u>	<u>(13.3)</u>	<u>197</u>	<u>(25.5)</u>
Total:	180	(33.8)	210	(72.6)
Industrial;				
New:	29	(14.9)	24	(5.4)
Additions & Alterations:	<u>70</u>	<u>(4.9)</u>	<u>89</u>	<u>(5.3)</u>
Total:	99	(19.8)	113	(10.7)
Total:	3303	(138.9)	3456	(162.0)

These figures show that there is considerable building activity in Christchurch. The monetary costs are estimates for each of the projects based on area, taking into account labour and materials. Timber is only one of many materials used in construction, but it is the most common, being used for some application in nearly all projects.

The volume of sawn timber consumed in the whole Canterbury region is currently around 340 000 m<sup>3</sup>, and is expected to increase as shown in figure 1.

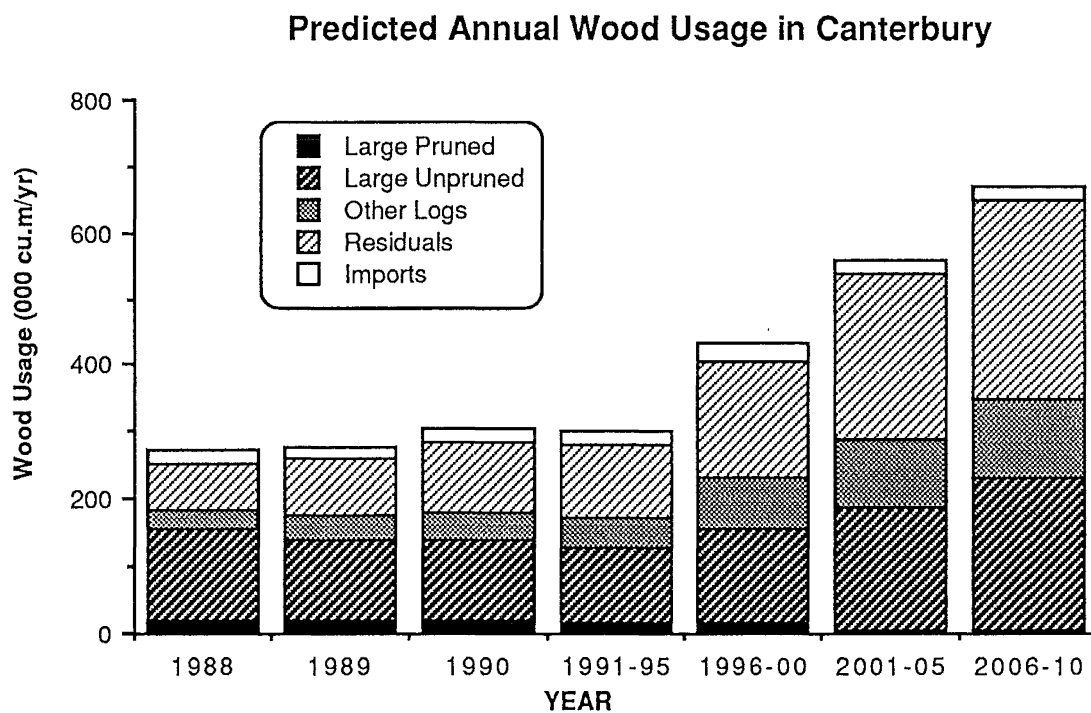


Figure 1. (ref: Johnson, S. 1989.)

## 2.2 Market Segments

It is possible to segment the market for sawn timber into several groups, each with an individual set of needs as determined by their end use. Each group places a different emphasis on each of the characteristics of product, volume, range, quality and service.

Five distinct sawn timber markets, and their characteristics are as follows.

### 1. New Home Construction

This trade segment is a very valuable one due to the high volume of turnover of materials. Typically a housing start will require significant quantities of 100 x 50 mm and 150 x 50 mm framing timber, sheets of flooring, weatherboard, fascia, and fencing and landscaping materials. Also, new home building activity generates a market for higher value commodities, such as finishing timber, mouldings and joinery timber. Often most or all of this timber will be bought through one company at a quotation rate (trade). A company will be well equipped to attract such business if it is able to provide all the materials necessary for the job, can provide support services such as roof truss manufacture and hardware sales, and can provide quick service, with good quality materials at a competitive price.



## 2. Renovation

This segment involves both the tradesperson and the DIY (do-it-yourself) market. Common renovation projects include bathroom and kitchen redecorating, and the removal of fireplaces from older houses. This is a very difficult segment to service, because it often demands small quantities of imperial dimension finishing and framing timber, and architrave patterns which are no longer in production. In many cases it is necessary to substitute with modern materials and dimensions, making the job more difficult. Due to the wide range of materials used in old house construction, and the small quantities required for renovation purposes, it would not be practical for the retail industry to concentrate on this market segment. It is more practical, although expensive, to get materials specially machined by joinery companies in order to obtain small amount of special dimension timber. There is a good range of materials available from demolition companies such as C.R.C. Salvage on Moorhouse Ave.

## 3. Home Handyman

The home handyman is usually concerned with smaller scale projects, so requires smaller amounts of timber at any given time. Often materials are often bought on Friday afternoons, or during the weekend. Service is important to this market segment which often needs advice and timber cut down to manageable lengths for transportation. Because of this they pay a higher price, but are willing because of the convenience. Usually they are saving money on the other hand by avoiding getting a professional in to do the job.

#### 4. Industrial/Construction

This is an industry which uses a large quantity of timber, and will often deal directly with a sawmiller. However, they may be prepared to deal through a large retailer for smaller quantities, or purely for convenience. This segment uses framing and box grade of timber for a wide range of end uses in the construction industry.

#### 5. Factory/Joinery

Another trade market segment, which uses higher grades of timber for cabinet making or re-manufacturing applications. Again they will often deal directly with sawmillers, but smaller factories, or companies requiring small quantities at short notice may deal with a retailer. This segment uses a wider variety of timber species for appearance purposes, or for special applications.

### 2.3 Medium Density Fibreboard Substitution

A relatively recent innovation in the sawn timber market is medium density fibreboard (MDF). This reconstituted wood product can be used as a substitute for finishing applications such as joinery and mouldings. MDF retails for a similar price to dressed radiata pine, and gives similar or even superior finishing results in many applications. It does however have its limitations. MDF is unsuitable for use in damp environments, such as outside or in the bathroom or kitchen. MDF has considerable cost advantages in mouldings, especially compared with those made from rimu. Because MDF can be made in the desired shape there is little waste

involved in the manufacture of mouldings, and any waste can be recycled.

Customwood (MDF brandname) is manufactured locally in Sefton by Canterbury Timber Products. There are also other brands available in Canterbury which have been manufactured in other regions. The main example being Golden Edge which is manufactured in Nelson by Nelson Pine Industries. MDF is commonly manufactured in dimensions and patterns matching that of metric timber dressed and moulded timber. Because of these facts MDF is usually sold in timber retail outlets, and so is included in this survey.

### **3.0 Timber Yards**

There are a large number of timber yards in Christchurch City. Many of them are very small, carrying only the minimum of stock due to limitations of capital and space. They are often acting as middlemen to a specific range of clients, rather than appealing to the market as a whole. Therefore they are beyond the scope of this study. There are, however, several timber yards which are of higher profile and operate on a larger scale. They are aiming at a wider range of the sawn timber market, and so are competing for the same business. Here are nine companies which are trading in competition with Placemakers.

<u>Company</u>	<u>Location</u>
1. Anderson & England	11 Watts Rd. Sockburn.
2. Baigent Building Supplies.	567 Wairakei Rd. Burnside.
3. Jarrah Timber.	106 Antigua St. Sydenham.
4. John Edmond.	322 Manchester St.
5. Keighley Timber.	190 Maces Rd. Woolston.
6. Lumber Specialties.	115 Main South Road.
7. McVicar Timber.	242 Ferry Rd.
8. McVicar Timber.	319 Cranford St.
9. Timber supplies.	222 Colombo St. Sydenham.

Even within this group of companies there is considerable variation in size, and the results may indicate some generalisations about the activities of a larger company. e.g. economies of scale. It is likely that, because all of these companies are within Christchurch City, they will be competing for the same market, especially when dealing with larger quantities of timber as demanded by the trade market. Each of

these retail outlets were surveyed for price, service and presentation/promotion to find the marketing strategy employed by each to appeal to their intended market. The survey forms were taken to each yard and completed on-site. The yards were surveyed by observation and staff were interviewed over three consecutive weekdays to minimise the risk of bias due to weekend activity etc.

## **4.0 Marketing Strategy**

The business of marketing is very important in timber retailing. Because there are several distinct timber markets then a company must identify which market segments it is aiming to service. It is difficult, for example, for one company to service the home handyman markets and the trade market. The two segments have very different requirements, and actually want to be treated differently. They have different requirements for the levels of price, service and presentation. It is because these attributes are contradictory that a company must target its market via a balance of price, service and presentation/promotion.

Placemakers deals with its trade customers in a separate system to its retail customers. Because tradesmen usually buy larger quantities then they are usually given a discount rate (10 % on timber, 7.5% on MDF). It is important for tradesmen to have a recognised purchasing advantage over the public, because they are in the industry, and don't want to lose business to the home handyman. On the other hand, the home handyman will probably require more assistance, and will probably be prepared to pay for increased staffing levels. Some markets (e.g. DIY) require more products to be carried on site. This results in increased cost, due to space requirements, and higher levels of stock damage. Placemakers restricts its product range to products which are expected to 'turnover' every 3 months to minimise stock damage and degradation.

## **5.0 Survey - Products**

In order to gain an idea of a company's intended market it is important to look at their range of products. A wide range of products is always desirable from the point of view of the consumer, but is costly to the merchant. Following is a list of timber used in a very wide range of applications by the whole market. Each timber yard was surveyed to check availability and retail price inclusive of G.S.T.

### **Framing Timber:**

- a) 100 x 50 H1 P/G No.1 Radiata
- b) 100 x 50 BA P/G Rimu
- c) 100 x 25 RS H3 Radiata
- d) 300 x 100 RS NZ Oregon
- e) Ex 200 x 25 PP Fascia
- f) 150 x 25 Bevel back Radiata Weatherboard

### **Finishing Timber**

- g) Ex 150 x 25 DA D4S Rimu
- h) Ex 150 x 25 D4S Radiata
- i) Ex 75 x 40 DA D4S Rimu
- j) Ex 75 x 40 D4S Radiata

### **Mouldings**

- k) 10mm Dowell
- l) 28mm Rimu Scotia
- m) 60 x 10 Bevel edged rimu architrave
- n) 60 x 12 Bevel edged MDF architrave

### **Fencing Timber**

- o) 4.8m 75 x 50 H3 RS Radiata rails
- p) 2.7m 125 x 75 H4 RS Radiata posts
- q) 1.8m 150 x 12 H3 RS Radiata palings

A wide range of products was chosen to make sure that one company specialising in one range of timber did not have an advantage over other companies in this survey. For example, a company such as W. W. Keighley Ltd, who have their own machining facilities, should be able to offer mouldings at a cheaper rate than other companies.



## 6.0 Survey - Service

Service is becoming important in many retail industries today. The timber industry is a good example of how good customer service sets a timber yard apart from its competition. This is particularly important when there is such a large number of opposition companies as there are in Christchurch. However, providing good service (e.g. increased staff levels) is also costly to the merchant. Therefore the level of service must be balanced by increased prices and product turnover. There are several aspects to providing good service, including the range of products discussed under "Products".

In addition to having a good range of timber it is good marketing strategy to provide a range of other products which is of interest to the intended market. In this case the company may want to diversify into selling other building materials (e.g. wallboards) or hardware. There is the potential to create a 'one-stop-shop' type of operation such as Placemakers. It is important to remember that some companies may have originated in selling a product other than sawn timber, and diversified into the sawn timber market to achieve the same result.

Other aspects of service surveyed are;

Staff Courtesy:	<input type="checkbox"/>
Prompt Assistance:	<input type="checkbox"/>
Knowledgeable Staff:	<input type="checkbox"/>
Parking Availability:	<input type="checkbox"/>
Good Timber Range:	<input type="checkbox"/>
Hardware Sales:	Y/N
Wallboard Sales:	Y/N
Free Advice Brochures:	Y/N
Trailer Availability:	Y/N
Delivery:	Y/N
Trade Discount:	Y/N

## 7.0 Survey-Presentation & Promotion

Presentation and promotion are also important in improving the competitiveness of a timber company through having a more desirable image. Again it is at a cost to the retailer, but effective use of advertising and better presentation can increase overall sales. It is first necessary to identify the intended market, and aim to meet their desired standards. The following aspects of presentation and promotion were surveyed for each of the timber yards concerned.

<u>Presentation:</u>	Excellent . . . . .	Poor	<u>Comments</u>
	(5) (4) (3) (2) (1)		
Presentation of Staff:	<input type="checkbox"/>		
Tidiness of Grounds:	<input type="checkbox"/>		
Location of Yard:	<input type="checkbox"/>		
Layout of Yard:	<input type="checkbox"/>		
Presentation of Timber:	<input type="checkbox"/>		
Labelling of Prices:	<input type="checkbox"/>		

<u>Promotion:</u>	
Use of Newspaper Advertising:	Y/N
Use of Mail Advertising:	Y/N
Use of Radio Advertising:	Y/N
Use of Television Advertising:	Y/N

## 8.0 Survey Results

### 8.1 General Observations.

#### Notes on Placemakers:

Placemakers Riccarton is located on the corner of Mandeville street and Blenheim road. There are other Christchurch branches on Leeds street and at New Brighton. The Riccarton branch is a very big operation selling almost everything necessary for building a home and landscaping the grounds. They are aiming at all market segments, with an intended balance of 80% trade sales and 20% retail sales by value. Their method of selling is such that they can deal with all timber requirements regardless of size because they have a large amount of stock. Some stock is open allowing small quantities to be purchased, while packs of timber are also held in stock for larger purchases (e.g. for new home construction). Also, because of their large scale of operation, they have the space available to carry a wide range of timber products. The limiting factor in determining the range is the demand for the various products, because of the 'shelf life' of the timber due to degradation. However, they can get products to order at short notice from most manufacturers as required.

### 1. Anderson & England:

Anderson and England are one of the smaller yards visited, although it had a good range of stock. They will, however, be moving to a larger yard in a couple of weeks. The company is newly established, being only 18 months old. It was probably the best presented yard from the point of view of the retail customer. The grounds were clean and stock was arranged in a tidy fashion. It appeared that they would appeal to the retail customer, and to smaller tradesman to a certain degree. They claimed to have a number of regular trade customers who purchased nearly all their timber through them. The atmosphere was pleasantly quiet, making shopping a less stressful experience. The staff were very friendly in a casual way, which seems to encourage regular customers. They also claimed to get a lot of business from older people wanting hassle-free shopping. There is the option of driving through their building, making wet weather shopping more desirable.

### 2. Baigents Building Supplies:

This yard was of average size, similar in concept to Placemakers aiming for a "one stop shop" for all building requirements, including hardware. Their presentation was good, with a lot of their stock being kept indoors in a drive-through type store. The outside grounds were arranged in a logical order, with stock being in good condition and tidy. However the location of the yard was not near to any considerable building activity nor centrally located. In their

favour they did not have much competition nearby. They look to be aiming at both the home handyman and the tradesman. They were reasonably well stocked, both in range and quantity.

### 3. McVicars (Ferry Rd.):

This McVicars yard is the other of the small yards visited. It must be remembered, however, that it is only a service yard or branch of the McVicars chain of retail outlets. It is more typical of a traditional timber yard, being less than tidy, perhaps from customer activity? The Office also contained a small hardware shop, reminiscent of Arkwright's Store. The stock held in this store was extensive, concentrating on paint and fastenings, rather than stocking tools etc, suggesting that they were aiming at the trade market. The yard appeared to be lacking logic in its layout. There was a lot of timber outside, exposed to the elements, showing signs of deterioration. The range of products held was reasonable, although there was not a large stock of any particular product. Vehicle access to the yard is difficult, especially now that traffic islands have been constructed in the Ferry road / Moorhouse ave. intersection. Parking on site is limited, and street parking is not desirable in this situation.

#### 4. McVicars (Cranford St):

I did not find this yard to be suited to the typical customer. The atmosphere suggested that they were trading to service a regular clientele, and that casual or first time customers were an inconvenience. The staff seemed to be unsatisfied with the industry in general, and had a negative attitude towards the promotion of their company. They were, however, knowledgeable, and had a good range of products in both timber and hardware. The hardware section was a more pleasant operation, and could well be supporting the timber section from a marketing viewpoint.

#### 5. Jarrah Timber:

Jarrah Timber is a large yard, being mostly outdoors. They have a very wide range of products, specialising in alternative and special purpose timbers. They are involved in both the selling of timber, and they processing and re-manufacture of timber. They trade in co-operation with Builders Hardware Ltd who operate next door. Builders Hardware sell almost everything in the way of tools, locks, fastenings, sheet products, Pink Batts, MDF products etc. They have parking available, and vehicles can drive from the timber yard through to the hardware section. They appear to be aiming at the retail, trade, industrial and joinery market segments. The yard was well presented at the front, where retail trade was most active. However the appearance became more untidy as I went to the rear of the grounds where the timber machining was performed. The

layout of the stock was good, making it easy to find basic building requirements.

6. John Edmond:

This was one of the more market oriented operations I visited. They obviously had a high regard for presentation, working in a tidy, well set out yard in a central location. Their location would be very valuable for attracting the home handyman business wanting to purchase materials on their way home from working in town. Their operation could quite easily be compared with Placemakers, meeting similar standards in presentation, range and layout. I would expect that the two companies would be competing for the same business.

7. Keighley Timber:

This was the biggest yard I visited, and probably the oldest being about 80 years old. They had an immense amount of stock in all sorts of products. They are involved in all timber market activities, including supplying other timber yards. They also machined some of their own dressed timber and mouldings. The staff were well presented, particularly those in the office. Their location is industrial in setting, and looked to be aiming mainly at the trade segment. The layout of the yard was kept simple by its long narrow shape and by the lack of hardware and wallboard sales.



#### 8. Lumber Specialties:

Lumber Specialties was also a very large yard. Again they deal with all segments of the market, including supplying smaller timber yards. They had a very wide range of products, stocking over 20 species of timber. They had kilns and drystores for the drying of timber, and machining facilities for further processing and finishing of timber. They did not have a lot of parking available, and not a lot of stock was on display, suggesting an emphasis on the trade and construction industries, where larger quantities and orders of timber are involved.

#### 9. Timber Supplies Ltd:

Timber supplies are a medium sized yard, stocking a reasonable range of products, with a notable range of Douglas Fir (New Zealand Oregon) sizes. The staff were knowledgeable and friendly, but casually presented in attitude and appearance. As a result they are one of the more relaxed yards to visit. They are a timber yard with an emphasis on servicing the trade industry servicing a group of regular customers, but are quite willing to serve retail customers as well.

## 8.2 Products.

Here is a summary of the results from the products survey showing prices.

### COMPANY:

Placemakers	1	2	3	4	5	6	7	8	9	
<u>Product;</u> (Prices incl GST)										
a)	3.97	1.57	4.08	2.63	3.33	2.03	3.66	2.20	2.20	3.30
b)	3.02	1.40	1.74	1.80	N/A	1.57	2.68	N/A	N/A	2.64
c)	1.88	2.80	1.94	1.69	1.88	1.60	1.69	1.74	1.64	1.96
d)	32.77	29.13	25.28	21.87	25.54	19.77	23.32	28.84	28.84	25.50
e)	8.54	8.94	8.28	N/A	10.29	7.22	7.73	7.22	N/A	9.22
f)	4.11	3.31	4.26	3.71	5.06	3.43	3.34	4.04	4.04	3.79
g)	5.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42
h)	4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42
i)	4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58
j)	4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58
k)	0.90	0.83	0.95	N/A	0.68	N/A	0.65	0.77	0.77	0.74
l)	2.97	2.86	2.97	2.50	3.17	2.33	3.07	2.73	2.73	2.64
m)	3.04	2.64	2.76	2.31	2.95	2.46	2.57	3.24	3.24	2.51
n)	2.03	1.85	1.90	N/A	1.70	N/A	N/A	1.57	1.70	N/A
o)	7.90	8.04	11.94	9.68	8.16	8.83	10.90	8.90	8.90	8.00
p)	11.15	11.50	17.90	14.65	14.87	14.06	18.26	11.80	11.50	11.50
q)	1.35	1.23	2.08	1.66	1.60	1.46	1.69	1.50	1.50	1.30

It is clear that there is a wide variation in the prices of the products surveyed. Because these companies are all competing in similar markets it would appear that price is not so important in the marketing of sawn timber. In reality, some of the products are not homogeneous, and some quality issues are raised. This would be true of the weatherboard, for example, which can be machined from a range of grades of timber, and therefore should sell for different prices. There is a wide range of prices quoted for No. 1 radiata framing. This is due to the grades being inconsistent. No. 1 framing, as defined by the New Zealand timber grading rules (NZS 3631) does not turn out to be very good value due to the waste and the cost of grading. Most sawmillers produce a less consistent grade (sometimes termed utility grade) of timber at a significantly lower cost, but is adequate for nearly all building applications.

Also, the prices quoted are "book prices" and are really only relevant for small quantity retail purchases. Most of the prices, except perhaps fencing materials, are very negotiable, depending on the quantity purchased, the relationship between the yard and the customer, and how many other materials the customer is buying (or has bought). Radiata framing timber is a very variable material because it is often sold at a "pack rate" which is negotiated between the yard and the customer for quantities of about 600 linear metres or more. I will assume that because all companies offer trade discounts that using book prices will be a fair judgement of their pricing levels.

The range and volume of timber products carried by each of the timber yards appeared to be a function of size. Those smaller yards

with a space limitation reduced the amount of stock of each product rather than specialising in particular fields. This requires careful management to avoid running out of any one product, but has the advantage of not excluding any one market segment.

Another observation I made was that there were some appreciable differences in the dimensions of dressed timber (as distinct from framing timber). These differences amounted to about 5 mm in width and 2-3 mm in thickness. This was apparent across the whole range of sizes, and in both Radiata pine and rimu. This is despite their being a standard size as described in NZS 3601. A similar observation was made about architraves. This has been attributed to the being a choice of companies who machine the timber. Also, mouldings are machined from existing dressed timber. The result of this is that customers wanting to buy finishing timber to match existing applications will want to buy from the same retailer, hence simulating customer loyalty.

Another observation regarding the home handyman is that there is often some confusion regarding the size of timbers. The size of timber varies depending on whether the timber is rough sawn, planar guaged or dressed. In all cases the call size is usually used, which the size of the board after sawing, but before finishing. It may be valuable for the industry to make this convention more widely understood.

McVicars, Lumber Specialties, Keighley and Jarrah timber yards, being some of the larger operations, were, on average, cheaper than the other yards. However, because price does not appear to be the most important feature in marketing, these companies were still competing with those smaller companies and those companies such as Placemakers who concentrate more on customer service and satisfaction.

### 8.3 Service.

The level and type of service at each of the timber yards varied considerably. Because each market segment has different demands for service then this gives an indication as to which market segment each of the timber yards is aiming to cater for. This is, however, complicated in many instances because most of the yards are in fact aiming to cater for more than one market segment. Having said this there are still some basic aspects of service which must be provided in appropriate levels to ensure customer satisfaction. These include prompt service, friendly staff, knowledgeable staff and a good product range. It is, however, difficult to decide what is an appropriate level of service is which both meets the needs of the customer and can be afforded by the company. I will therefore make comments about each of the companies surveyed based on first impressions, which is what is most influential to new customers.

Placemakers.

Placemakers' service is generally very good, although being such a large organisation that sometimes the personal touch is lacking. Sometimes there were mistakes caused though lack of communication, but in accordance with Placemakers' emphasis on service these are always corrected in the favour of the customer. Customer satisfaction is their main priority. The staffing level compared very favourably with other timber yards and the range of services is very comprehensive. There is considerable emphasis placed on the presentation of staff, stock and the grounds.

1. Anderson & England.

This company also offered good service, but on a different scale to that of Placemakers. The service was very personal, but the range of services offered was limited to that of timber sales. Because of the small scale of the operation there were only two sales staff, so if several customers were in the yard at the same time the service would be limited. However this problem appears to occur in all operations, regardless of its size.

## 2. Baigent Building Supplies.

Baigents was more service oriented than most of the other yards. They aimed to provide a wider range of services such as sales of hardware and wallboards. The staffing level was adequate, with some staff concentrating on servicing the trade market.

## 3. Jarrah Timber.

Jarrah Timber offered a wide range of services, having the facilities to carry out most machining jobs. With Builder's Supplies being next door they benefit from the opportunity for 'one-stop-shopping'. The staff appeared to be a bit scarce, although I could not see anything which distinguished them from customers. The office staff were the exception to this, who were well presented and eager to be of assistance.

## 4. John Edmond.

This company provided good service, despite the sometimes large number of customers shopping there. As with Placemakers, John Edmond stock everything necessary for new home construction. These products are laid out in a well ordered arrangement allowing customers to find things for themselves if they so desire. Again they cater for the whole of the sawn timber market by having a wide range of timber products in sufficient quantities as to be able to supply the home handyman as well as the builder. The limited size

of their yard due to their central location is probably a controlling factor on the amount of stock carried at any one time, but they are able to get timber to order within a couple of days.

#### 5. Keighley Timber.

W. W. Keighley Ltd. offer a good range of services aimed more at the trade market. Their services include timber dressing, roof truss manufacture and moulding manufacturing. Their scale of operation is of a size suited more to servicing industrial applications, smaller timber yards and tradesmen. Their business is purely in the timber industry. They don't sell much hardware and do not stock any MDF mouldings or sheets. They are probably the most specialised of the timber yards I visited, but operated on such a scale as to be profitable.

#### 6. Lumber Specialties.

This is another of the larger timber yards which appear to be aiming to service the trade industry rather than the retail DIY market. There is a lot of timber in the yard, most of it being in pack form rather on display for smaller purchases. The layout of the yard is industrial in setting, being difficult to find ones way around for the first time. Lumber Specialties have facilities for air drying or kiln drying pack lots of timber. One of their specialist services is their range of species, stocking more than 20 species of indigenous, exotic and imported timbers, but no MDF products. They also have resawing capabilities for further breakdown of larger sizes of timber and for sawing specific sizes. These features appeal to the joinery industry and to the



renovation market which require specific products for appearance purposes and to match existing applications. The yard doesn't have much parking space available and has no road frontage which also suggests that Lumber Specialties is aiming at trade customers. The service offered by the staff was appropriate to their intended market, but wouldn't suit the home handyman.

#### 7. McVicar Timber. (Ferry Road)

This branch of McVicar's timber is a smaller service branch of the chain. They stock a small amount of a wide range of products, but not very much of any one product line. They stock a similar range in hardware products. Overall they have the capacity to service the DIY market well, but would not be sufficient for the larger scale trade customers. i.e. they fulfil their function as a service branch. Having said this they could easily improve their overall image which would inspire more confidence from the customer.

#### 8. McVicar Timber. (Cranford St.)

This is a larger branch of McVicar's Timber. They have a wider range of products, both timber and hardware. One notable exception from the range of both branches is building grade rimu. This will appeal to the conservationists among us, but may well become a feature of the whole industry in the future due to environmental pressure. Also, McVicar's saws a lot of its own timber at its mill on Johns road, while most rimu is freighted from the West Coast already sawn. There were not many staff available to assist customers, and those

that were there appeared to have better things to do. However the service provided in the hardware section was better. They have the facilities for manufacturing roof trusses. Parking availability is good, and there is room to manoeuvre a trailer around the yard, and there is a drive through for the wallboard section. The yard is located in a good position, being the only timber yard in the area, which is in the northern suburbs where there is some subdivision going on.

#### 9. Timber supplies.

This is an older company in an older part of the city. They should be in a good location to capture the renovation sector of the market, but perhaps don't have the facilities. They are aiming at both the retail and a regular trade markets by having a lot of timber on display, and by preparing and buying in timber to fill orders for tradesmen. A feature of this company is their range of Douglas fir which is more comprehensive than the other companies. However they do not stock wallboard or MDF products. Their hardware range is limited to nail plates, nails, screws and other fasteners. However there is a Mitre 10 hardware shop about 100 metres down Colombo street. There is ample room to drive in and park a vehicle and trailer and there is usually street parking available. There are not many staff employed there, but they are friendly and experienced in the industry, so are able to offer advice.

The trade segment's service needs are important. They are prepared to pay for good service because as professionals their time is worth money, and the less time they spend buying timber the more they

can be working. The cost of this service may be recovered by slightly higher prices, but mainly through repeat business in the future.

Some of those companies surveyed often took phone orders for special quantities of timber. The timber yard would then prepare the order ready for the customer to collect, or even deliver it without the customer even coming to the yard. This degree of time saving is particularly valuable to the trade market.

Another aspect of service which may influence which market segment is attracted to a company is their hours of trading. In general tradesmen prefer to purchase their materials in the morning before going to the building site. Home handymen, on the other hand, make most of their purchases in the evenings on their way home from work, or on Saturday mornings. The hours of trading for each of the companies are:

	<u>Mon-Fri</u>	<u>Sat</u>
Placemakers.	7.30-6.00	8.00- 4.00
1. Anderson & England.	7.30-5.00	8.00-12.00
2. Baigent BuildingSupplies.	7.30-5.00	8.00-12.00
3. Jarrah Timber.	8.00-4.30	8.00-12.00
4. John Edmond.	7.30-5.30	8.00- 4.00
5. Keighley Timber.	7.30-4.30	8.00-12.00
6. Lumber Specialties.	8.00-5.00	8.00-12.00
7. McVicar Timber. (Ferry Rd)	7.30-5.00	8.00-12.00
8. McVicar Timber. (Cranford St)	7.30-5.30	8.00- 4.00 & Sun.
9. Timber supplies.	7.30-5.00	8.00- 4.00

Delivery is an aspect of service which is of importance to those customers who are buying large quantities of timber or long lengths

of timber. The cost of delivery is relatively cheap, averaging about \$10.00 - \$15.00 for smaller quantities up to about one cubic metre. As with timber prices, the cost of delivery appears to be negotiable, depending on the value of the materials being delivered and the relationship between the customer and the timber yard. Often a timber yard will organise delivery to areas outside Christchurch such as Kaiapoi or Governor's Bay via a private freight company.

The alternative to getting the company to deliver materials is to borrow a trailer from the company. Nine of the ten companies had a free loan trailer for the public to use for local deliveries. This gesture is mainly aimed at the home handyman segment as tradesmen usually have their own. Free loan trailers are desirable because it saves the customer the cost of hiring one which is typically \$8.00 - \$10.00.

A final observation about service based on my own experience in the timber industry is that GST is an ever-present source of confusion. All other industries except the motor parts trade have come to accept GST as being included in a price. Trade purchasers of timber expect prices to be exclusive of GST, while many retail customers do not. As a result there are two sets of prices being used in the market which differ by 12.5%. This may remain one of the peculiarities of the industry, rather than being a question of time to adapt. It was the trade market which adapted first to the introduction of metric measurement, but resists the use of GST.

#### 8.4 Presentation & Promotion.

The third aspect of marketing is presentation and promotion. These, combined with service, appear to be a major factor in attracting certain market segments. Again, the type and level of presentation and promotion must be appropriate to that demanded by the desired market segment. For example, the home handyman needs to be informed of what the timber yards have to offer through advertising. This may be seen in Friday's papers in the 'building materials' column which is aiming specifically aiming at the DIY market's Saturday shopping. The same may be said for radio and television advertising. The trade segment may be reached more easily because they will usually visit a retailer more frequently, and so may be told by staff or posters what the company has to offer. Alternatively, notices may be sent out with monthly accounts, or the tradesman may be dealing with company representatives.

Promotional sales are common in the industry in the interests of stock control and turnover. Because such sales attract such a large number of customers most companies have a policy of having some items on special all through the year. This is true of commonly purchased items such as fencing materials and framing timber. The aim is attract a larger number of customers who will buy more than just the products on special.

The customer is likely to respect a well presented timber yard. If the timber is well laid out and labelled with prices then shopping will be easier for the customer. It is important for the sake of appearance

that the timber be of good quality. This requires the company to store the packs on flat ground and to remove damaged and badly warped pieces. Dressed timber needs to be carefully stacked to prevent degrade. Storing dressed timber on end is convenient for the customer to sort through, but the timber is prone to warping and cupping because it is not stored flat. Timber stored outside should preferably be stored under some form of shelter from the rain, and preferably sheltered from the north west wind. The packs on display should be open to make the timber accessible. Also there should be a range of lengths available, or facilities for cutting timber to useful or manageable lengths.

The results of the survey may be seen in Appendix I for each of the aspects of presentation and promotion surveyed.

## 9.0 Analysis of Data

### 9.1 Price Data

The data collected for timber prices from the various outlets may be analysed to determine the marketing importance of price compared with non-price attributes in market competition.

#### a). The market as a whole;

The price for each of the 17 items (as described in section 5.0) may be averaged for all of the companies, and then a company's prices may be compared with the average. I have calculated the average prices, and compared Placemakers' prices with those averages. I have also calculated the standard deviations, and compared Placemakers' prices with the average plus one standard deviation.

<u>Product</u>	<u>All Firms</u>			<u>Placemakers' Price</u>
	<u>Average Price</u>	<u>Std. Dev</u>	<u>Average + Std. Dev</u>	
1	2.90	0.88	3.78	3.97
2	2.12	0.64	2.76	3.02
3	1.88	0.35	2.23	1.88
4	26.09	3.88	29.97	32.77
5	8.43	1.06	9.49	8.54
6	3.91	0.53	4.43	4.11
7	5.26	0.34	5.60	5.74
8	4.52	0.77	5.29	4.95
9	3.71	0.38	4.08	4.19
10	3.56	0.66	4.22	4.10
11	0.79	0.10	0.89	0.90
12	2.80	0.26	3.06	2.97
13	2.77	0.33	3.10	3.04

14	1.79	0.17	1.96	2.03
15	9.16	1.32	10.49	7.90
16	13.72	2.70	16.42	11.15
17	1.54	0.24	1.78	1.35

It can be seen that in 13 of the 17 cases Placemakers' prices were more expensive than the average. Of the 13 items, 7 were significantly more expensive to one standard deviation. Interestingly, the three items which were cheaper than average were fencing materials. These are materials which are subject to competition by timber yards because large volumes of timber are sold this way to customers who offer repeat business. Offering fencing materials at a low rate may be a strategy for attracting future business, particularly in the DIY market segment.

b). Market Segmentation.

The market may be segmented into 5 groups of sawn timber consumers who respond in a similar way to a particular marketing mix. Each of these segments have similar product requirements, and so may be targeted by a company by concentrating on providing those products at a competitive rate. The products surveyed were classified by end-use segments. This classification is based upon general utilisation practices observed in my own experience so is subjective, but consistent with usage patterns at Placemakers. This has been done as follows;

1) New Home Construction - all products surveyed.



- 2) Renovation -
- 100 x 50 H1 P/G No.1 Radiata
  - 100 x 50 BA P/G Rimu
  - Ex 200 x 25 PP Fascia
  - 150 x 25 Bevel back Radiata Weatherboard
  - Ex 150 x 25 DA D4S Rimu
  - Ex 150 x 25 D4S Radiata
  - Ex 75 x 40 DA D4S Rimu
  - Ex 75 x 40 D4S Radiata
  - 10mm Dowell
  - 28mm Rimu Scotia
  - 60 x 10 Bevel edged rimu architrave
  - 60 x 12 Bevel edged MDF architrave
- 3) Home Handyman -
- 100 x 50 H1 P/G No.1 Radiata
  - 100 x 50 BA P/G Rimu
  - 100 x 25 RS H3 Radiata
  - 150 x 25 Bevel back Radiata Weatherboard
  - Ex 150 x 25 DA D4S Rimu
  - Ex 150 x 25 D4S Radiata
  - Ex 75 x 40 DA D4S Rimu
  - Ex 75 x 40 D4S Radiata
  - 10mm Dowell
  - 28mm Rimu Scotia
  - 60 x 10 Bevel edged rimu architrave
  - 60 x 12 Bevel edged MDF architrave
  - 4.8m 75 x 50 H3 RS Radiata rails
  - 2.7m 125 x 75 H4 RS Radiata posts
  - 1.8m 150 x 12 H3 RS Radiata palings
- 4) Industrial -
- 100 x 50 H1 P/G No.1 Radiata
  - 100 x 50 BA P/G Rimu
  - 300 x 100 RS NZ Oregon
  - Ex 150 x 25 DA D4S Rimu
  - Ex 150 x 25 D4S Radiata
  - Ex 75 x 40 DA D4S Rimu
  - Ex 75 x 40 D4S Radiata
  - 10mm Dowell

28mm Rimu Scotia  
 60 x 10 Bevel edged rimu architrave  
 60 x 12 Bevel edged MDF architrave

- 5) Factory/joinery -      Ex 150 x 25 DA D4S Rimu  
                                      Ex 150 x 25 D4S Radiata  
                                      Ex 75 x 40 DA D4S Rimu  
                                      Ex 75 x 40 D4S Radiata  
                                      10mm Dowell

The total per metre prices were calculated for each of the companies for each of the market segments as defined above. The calculations are outlined in appendix II.

The result is that companies may now be ranked in order of price from lowest to highest in each of the market segments. The lower the price, the more price competitive the supplier is in each market segment.

Segment Total Price    Service/presentation

Ranking

1) New Home Construction

1. Jarrah Timber	78.73	45
2. WW Keighley	79.02	47
3. McVicar Cranford St	83.38	41
4. McVicar Ferry Rd	90.36	40
5. Timber Supplies	91.10	45
6. Lumber Specs	95.81	44
7. John Edmond	95.84	51
8. Anderson & England	95.88	43
9. Placemakers	102.61	50
10. Baigents	104.65	45

## 2) Renovation

1. Jarrah Timber	29.18	45
2. McVicar Cranford St	31.00	41
3. WW Keighley	33.30	47
4. McVicar Ferry Rd	37.58	40
5. Lumber Specs	39.95	44
6. Anderson & England	42.82	43
7. Timber Supplies	42.84	45
8. John Edmond	43.79	51
9. Baigents	45.51	45
10. Placemakers	47.56	50

## 3) Home Handyman

1. WW Keighley	52.03	47
2. McVicar Ferry Rd	54.30	40
3. McVicar Cranford St	54.54	41
4. Timber Supplies	56.38	45
5. Jarrah Timber	56.86	45
6. Anderson & England	57.81	43
7. John Edmond	20.01	51
8. Placemakers	61.30	50
9. Lumber Specs	64.76	44
10. Baigents	71.09	45

## 4) Industrial

1. WW Keighley	42.42	47
2. Jarrah Timber	47.34	45
3. Lumber Specs	52.20	44
4. John Edmond	53.98	51
5. McVicar Ferry Rd	55.16	40
6. Timber Supplies	55.33	45
7. McVicar Cranford St	55.80	41
8. .Baigents	58.25	45
9. Anderson & England	59.70	43
10. .Placemakers	67.68	50

## 5) Factory/joinery

1. WW Keighley	14.26	47
2. Jarrah Timber	16.23	45
3. McVicar Ferry Rd	16.58	40
4. Lumber Specs	16.90	44
5. McVicar Cranford St	17.09	41
6. John Edmond	17.29	51
7. Timber Supplies	18.74	45
8. Baigents	19.52	45
9. Placemakers	19.88	50
10. Anderson & England	20.25	43

These results indicate that there are some companies which concentrate on a specific mix of products and are successful by being price competitive. These companies are WW Keighley, Jarrah timber and the McVicar group. In general the companies offering the lowest prices in each of the market segments place less emphasis on service and presentation. It is important to realise the effect of discounting as referred to in section 8.2.

However, companies can often be seen as aiming at different market segments in their price competition. For example, Jarrah timber and Lumber Specialties are usually price competitive except in the home handyman segment. This is not a target segment in their marketing strategies, as discussed in section 8.1.

## 9.2 Service and Presentation

Service and presentation cover the non-price oriented aspects of marketing. These aspects include staff assistance and the presentation of the timber and the yard. The provision of these attributes are often at the cost of the customer who pays for the service, and so those yards rating highly in providing service and which are well presented may be expected to have higher prices.

Different market segments will demand different quantities of service and will have different expectations of the presentation of the timber yards. Therefore the provision of good service and presentation is a method by which market segments can be targeted.

The scores out of five for service and presentation were added together and averaged to make comparisons between the companies. The arithmetic is shown in appendix II, but as a result the companies may be ranked as follows;

<u>Rank</u>	<u>Company</u>	<u>Score</u>
1.	John Edmond	51
2.	Placemakers	50
3.	WW Keighley	47
4.	Baigents	45
5.	Jarrah Timber	45
6.	Timber Supplies	45
7.	Lumber Specs	44
8.	Anderson & England	43
9.	McVicars Cranford St	41
10.	McVicars Ferry Rd	40

Those attributes which were surveyed as being present or absent (ie yes/no answer) were collectively given a score out of five under the category "support services". The range in scores shows that there is significant difference (about 20%) between the highest and lowest ranking companies.

The companies ranking high in service and presentation are those companies which have prices which are in general higher than average. It is these companies such as Placemakers which are targeting the home handyman segments. The lower ranking companies are aiming at the trade market segments which purchase larger quantities of timber, making lower prices more significant.

Given that a company is able to provide good service or cheap prices we would expect that those companies having generally lower prices would rank lower in service and presentation and vice versa. In fact that is largely true, with some notable exceptions.

An approximate ranking for overall marketing effectiveness (excluding advertising which proved too difficult to quantify) may be obtained by the following procedure. Each company receives a score from 1 to 10 based on their ranking in service and presentation and prices. In this case we use the ranking from new home construction because it takes into account all products surveyed. The combined scores from both categories will give an overall ranking.

<u>Rank</u>	<u>Prices</u>	<u>Service &amp; presentation</u>	<u>Overall</u>
1. WW Keighley	2	3	5
2. Jarrah Timber	1	5	6
3. John Edmond	7	1	8
4. Placemakers	9	2	11
5. Timber Supplies	5	6	11
6. McVicar Cranford St	3	9	12
7. Lumber Specs	6	7	13
8. McVicar Ferry Rd	4	10	14
9. Baigents	10	4	14
10. Anderson & England	8	8	16

This ranking highlights those companies which I found to be lacking in both categories. However, the overall marketing used by some of these companies may be appropriate to their target markets if they are aiming at segments other than the general public.

Place makers and John Edmond rank highly despite having high prices. This is because their levels of service and presentation are sufficient to counteract their prices. By doing this they have successfully captured a large proportion of the home handyman market segment.

Those companies ranking low overall are Anderson & England, Baigents and McVicar's Ferry Rd. This is because these companies are failing to position themselves as either low price timber retailers or high service retail outlets. These companies are therefore not competitive in most market segments and are unlikely to do well in the future. Anderson & England does not have either low prices or very good service, so are failing appeal to any specific market segment. They are a new company, and they may be able to rectify this as they expand. Baigents had the highest prices on average and

its service is not sufficient to overcome this, so it will not effectively attract the home handyman segment. McVicars Ferry Rd, on the other hand, has lower prices, but its service is not judged to be adequate to be successful in the marketplace.



## 10.0 Future Directions

The market for sawn timber in Christchurch will continue to grow according to market forecasts such as that made by Steve Johnson (1989). However the industry servicing the market is changing. We have already seen a lot of small scale sawmill operations go out of business due to the costs of production, and the lack of those efficiencies which come with size. The larger processing plants are continuing to grow, and their operations are becoming centralised.

I believe that a similar trend will occur in the sawn timber marketing sector of the industry. Small scale operations will not be able compete with the larger ones because they are not able to offer the same services such as product range. These companies will either disappear, or be bought by larger companies to use as storage facilities or as service branches.

The results in the previous section support this prediction. Those companies ranking highly in overall marketing are the larger operations.

Another feature I expect to see in the not too distant future is the diversification of existing timber yards. Efforts will be made to satisfy all of the needs of the customer, which necessitates the sale of all building materials, hardware, landscaping materials and paint and wallpaper. This is the approach taken by Placemakers and John Edmond and also Benchmark Building Supplies in the North Island. Jarrah Timber are also achieving these objectives via co-

operation with another company. It is these companies which ranked well in overall marketing effectiveness. They are also diversifying into other areas such as re-manufacturing which has been the approach taken by WW Keighley. In achieving these objectives those companies that survive will become very large operations. Because the space required to run such an operation would be several hectares, timber yards will have to be located in suburban/industrial areas where the cost of land is lower than in the central city, but where they are still close to the market population. Space may become a limitation to John Edmond in the future.

I expect that price will continue to be of lesser importance to the market as a whole in the future, and that service and promotion will be the distinguishing factors in making a company a marketing success. In my observation, product quality is becoming increasingly important in the higher value product ranges, such as moulding and dressed timbers. This trend will probably continue. In fact the attention paid to quality may even increase as the substitution of rimu with radiata pine and MDF for mouldings and dressed timbers gains acceptance. Building timbers, on the other hand will become more price competitive with less emphasis paid to quality. This is because larger quantities of this product is used so small price advantages become significant. More building grade timber will become available as supplies increase. These lower grade products are homogeneous between suppliers, and may possibly be described as being a loss leader as a by-product of the production of higher grade timber.

## 11.0 Conclusion

The sawn timber market in Christchurch may be divided into the home handyman (retail), trade customers (builders), industrial, renovation and joinery markets segments. Each of these segments has its own requirements, and there are a large number of companies aiming to meet these requirements.

The success of a company may be attributed to an appropriate marketing mix of price, service and presentation and promotion. This investigation found service to be as important as price in that marketing mix. Presentation and promotion were as important as price in targeting the desired market segments. Those companies concentrating on providing good service and presentation rated comparably with those companies offering lower prices in overall marketing effectiveness.

The home handyman and trade market segments are well catered for in Christchurch by sawn timber retail outlets. The joinery and industrial markets still deal directly with sawmillers in many cases.

In the future I expect that many smaller timber retailing outlets will cease to exist, either being closed down or being bought by larger operations. The reason for this is that there will be increased demands placed on retailers by the market to provide better service by selling a wider range of products suited to the whole building industry. Smaller companies will find this difficult to provide, and

may eventually only exist to service a few large regular customers, making them vulnerable to takeover.

Most of the larger existing companies will expand their operations to increase their market share. It seems likely that the best way to achieve this is by diversifying to aim at the whole market, rather than aiming at specialist market segments. There is potential for selling to the joinery industry and to the industrial market as retailers increase in size. The differing requirements of the individual segments will call for accurate market targeting. Also these companies will need to concentrate on providing better service and a wider range of services. Examples of such services include delivery, hardware sales, timber machining and offering credit accounts.

## **12.0 Suggestions for Future Study**

This study would have revealed a lot more about marketing if overall sales figures for each of the companies were available. Because of its sensitive nature such information is fairly secret and so we have to develop other indirect measurements.

There is more to learn about the requirements of each of the market segments described. Such information includes their expectations and priorities about prices and levels of service. This information may be obtained by interview or questionnaire aimed at the customer rather than the retailer.

Also, the value of each market segment would be useful information. The value of each market segment is determined by the amount that they buy combined with the value of the products they use. The profitability of the products they use is also of interest to the retailer.

Such information would allow each of the attributes I surveyed to be weighted for each market segment giving a more accurate ranking of prices and service/presentation plus advertising.

This information would also allow the retailer to more accurately target their desired market segments in relationship to the importance of individual segments.

## Acknowledgements

I would like to thank the staff of all the companies involved in the survey for their co-operation in helping me to reach my conclusions.

Placemakers (Riccarton) was particularly valuable in allowing me to gain an insight into the local market, and to look at the marketing activities of a successful sawn timber retailer.

The staff at the School of Forestry, particularly Dr Robert Donnelly and Dr Ted Belik must be thanked for their encouragement and assistance in preparing this study.

The Christchurch City Council must also be commended for making available to me such extensive statistics, from which I was able to draw a few generalisations.

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## Appendix I - Survey Forms

Following are copies of the original forms used in the survey. It must be remembered that the information in them is subject to change, and may be subjective in nature.



## Survey - Products

Company: Placemakers.

### Framing Timber: (per lin metre)

	PRICE
100 x 50 H1 P/G No.1 Radiata.....	3.97
100 x 50 BA P/G Rimu.....	3.02
100 x 25 RS H3 Radiata.....	1.88
300 x 100 RS NZ Oregon.....	32.77
Ex 200 x 25 PP Fascia.....	8.54
150 x 25 Bevel back Radiata Weatherboard.....	4.11

### Finishing Timber: (per lin metre)

Ex 150 x 25 DA D4S Rimu.....	5.74
Ex 150 x 25 D4S Radiata.....	4.95
Ex 75 x 40 DA D4S Rimu.....	4.19
Ex 75 x 40 D4S Radiata.....	4.10

### Mouldings: (per lin metre)

10mm Dowell.....	90¢
28mm Rimu Scotia.....	2.97
60 x 10 Bevel edged rimu architrave.....	3.04
60 x 12 Bevel edged MDF architrave.....	2.03

### Fencing Timber: (each)

4.8m 75 x 50 H3 RS Radiata rails.....	7.90
2.7m 125 x 75 H4 RS Radiata posts.....	11.15
1.8m 150 x 12 H3 RS Radiata palings.....	1.35

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: Placemakers

	Excellent . . . . .	Poor	<u>Comments</u>			
	(5)	(4)	(3)	(2)	(1)	
Staff Courtesy:					<input type="text" value="4"/>	
Prompt Assistance:					<input type="text" value="4"/>	
Knowledgable Staff:					<input type="text" value="3"/>	
Parking Availability:					<input type="text" value="5"/>	
Good Timber Range:					<input type="text" value="4"/>	
Hardware Sales:					<input checked="" type="radio"/> Y/N	
Wallboard Sales:					<input checked="" type="radio"/> Y/N	
Roof Truss Manufacture:					<input checked="" type="radio"/> Y/N	
Free Advice Brochures:					<input checked="" type="radio"/> Y/N	
Trailer Availability:					<input checked="" type="radio"/> Y/N - 2 trailers	
Delivery:					<input checked="" type="radio"/> Y/N \$12.94 /cubic metre.	

Hours: 7.30-6.00 M-F,  
8.00-4.00 Sat.

MACHINING: \$6.00 /10 mins + GST.

## Survey - Presentation & Promotion

Company: Placemakers

Presentation:                      Excellent . . . . . Poor  
(5)   (4)   (3)   (2)   (1)                      Comments

Presentation of Staff: 5

Tidyness of Grounds: 4

Location of Yard: 4

Layout of Yard: 4

Presentation of Timber: 4

Labelling of Prices: 4 - Good inside, no labelling outside.

### Promotion:

Use of Newspaper Advertising: Y/N

Use of Mail Advertising: Y/N

Use of Radio Advertising: Y/N

Use of Television Advertising: Y/N

Sale Items: Y/N

Trade Discount Y/N

No. 1. 100 x 50 Radiata  
Pack Rate (~600m) \$2.03.

## Survey - Products

Company: Anderson & England

### Framing Timber: (per lin metre)

		PRICE	
100 x 50 H1 P/G No.1 Radiata.....	1.77	1.57	(No.2.) (pack rate.)
100 x 50 BA P/G Rimu.....		1.40	
100 x 25 RS H3 Radiata.....		2.80	
300 x 100 RS NZ Oregon.....		29.13	
Ex 200 x 25 PP Fascia.....		8.94	
150 x 25 Bevel back Radiata Weatherboard.....		3.31	

### Finishing Timber: (per lin metre)

Ex 150 x 25 DA D4S Rimu.....	5.42	
Ex 150 x 25 D4S Radiata.....	5.70	treated.
Ex 75 x 40 DA D4S Rimu.....	3.57	
Ex 75 x 40 D4S Radiata.....	4.73	treated.

### Mouldings: (per lin metre)

10mm Dowell.....	83
28mm Rimu Scotia.....	2.86
60 x 10 Bevel edged rimu architrave.....	2.64
60 x 12 Bevel edged MDF architrave.....	1.85

### Fencing Timber: (each)

4.8m 75 x 50 H3 RS Radiata rails.....	8.04
2.7m 125 x 75 H4 RS Radiata posts.....	11.50
1.8m 150 x 12 H3 RS Radiata palings.....	1.23

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: Anderson & England

Excellent . . . . . Poor

Comments

(5) (4) (3) (2) (1)

Staff Courtesy:

4

Prompt Assistance:

4

Knowledgeable Staff:

4

Parking Availability:

2

Good Timber Range:

3

Hardware Sales:

(Y/N) Little bit

Wallboard Sales:

(Y/N) MDF, Ply

Roof Truss Manufacture:

(Y/N)

Free Advice Brochures:

(Y/N)

Trailer Availability:

(Y/N)

Delivery:

(Y/N) min 2 m<sup>3</sup> \$35.00 + GST

Hours ' M-F 7.30 - 5pm.  
S. 8-12pm

## Survey - Presentation & Promotion

Company: Anderson & England

Presentation:

Excellent . . . . . Poor

(5)    (4)    (3)    (2)    (1)

Comments

Presentation of Staff:

3

Tidyness of Grounds:

5

Location of Yard:

4

Layout of Yard:

4

### Presentation of Timber:

4

### Labelling of Prices:

2

Promotion:

Use of Newspaper Advertising: Y/N

Use of Mail Advertising: ☒ Y ☐ N

Use of Radio Advertising: ☒ Y ☐ N

Use of Television Advertising: ☒ Y ☐ N

Sale Items: Y/N trellis, fencing etc.

Trade Discount ☒ Y/N trade accounts

## Survey - Products

Company: Baigents

<u>Framing Timber:</u> (per lin metre)	PRICE
100 x 50 H1 P/G No.1 Radiata.....	<div>3.63 4.08</div>
100 x 50 BA P/G Rimu.....	<div>1.55 1.74</div>
100 x 25 RS H3 Radiata.....	<div>1.72 1.94</div>
300 x 100 RS NZ Oregon.....	<div>22.47 25.28</div>
Ex 200 x 25 PP Fascia.....	<div>7.36 8.28</div>
150 x 25 Bevel back Radiata Weatherboard.....	<div>3.79 4.26</div>

<u>Finishing Timber:</u> (per lin metre)	
Ex 150 x 25 DA D4S Rimu.....	<div>4.50 5.06</div>
Ex 150 x 25 D4S Radiata.....	<div>4.53 5.10</div>
Ex 75 x 40 DA D4S Rimu.....	<div>3.72 4.19</div>
Ex 75 x 40 D4S Radiata.....	<div>3.75 4.22</div>

<u>Mouldings:</u> (per lin metre)	
10mm Dowell.....	<div>0.84 0.95</div>
28mm Rimu Scotia.....	<div>2.64 2.97</div>
60 x 10 Bevel edged rimu architrave.....	<div>2.45 2.76</div>
60 x 12 Bevel edged MDF architrave.....	<div>1.69 1.90</div>

<u>Fencing Timber:</u> (each)	
4.8m 75 x 50 H3 RS Radiata rails.....	<div>10.61 11.94</div>
2.7m 125 x 75 H4 RS Radiata posts.....	<div>15.90 17.90</div>
1.8m 150 x 12 H3 RS Radiata palings.....	<div>1.25 2.08</div>

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: Baigents

Excellent . . . . . Poor

Comments

(5) (4) (3) (2) (1)

Staff Courtesy:

Prompt Assistance:

Knowledgeable Staff:

Parking Availability:

Good Timber Range:

Hardware Sales:

(Y/N)

Wallboard Sales:

(Y/N)

Roof Truss Manufacture:

(Y/N)

Free Advice Brochures:

(Y/N)

Trailer Availability:

(Y/N)

Delivery:

(Y/N) ~ \$12.50 /m<sup>3</sup>.

7.30-5.00'

8.00-12.00'



## Survey - Presentation & Promotion

Company: Baigents

Presentation:            Excellent . . . . . Poor

(5)   (4)   (3)   (2)   (1)

Comments

Presentation of Staff:

3

### Tidyness of Grounds:

3

Location of Yard:

3

Layout of Yard:

4

### Presentation of Timber:

3

### Labelling of Prices:

4

Promotion:

Use of Newspaper Advertising: Y/N

Use of Mail Advertising: Y/N

Use of Radio Advertising: Y/N

Use of Television Advertising: Y/N not recently

Sale Items: ☒ Y/N

Trade Discount Y/N

## Survey - Products

Company: JARRAH TIMBER CO. (1989) LTD.

<u>Framing Timber:</u> (per lin metre)	PRICE
100 x 50 H1 P/G No.1 Radiata.....	2.63
100 x 50 BA P/G Rimu.....	1.80
100 x 25 RS H3 Radiata.....	1.69
300 x 100 RS NZ Oregon.....	21.87
Ex 200 x 25 PP Fascia.....	N/A.
150 x 25 Bevel back Radiata Weatherboard.....	3.71.

<u>Finishing Timber:</u> (per lin metre)	
Ex 150 x 25 DA D4S Rimu.....	4.88
Ex 150 x 25 D4S Radiata.....	<del>3.21</del> 4.45
Ex 75 x 40 DA D4S Rimu.....	3.21
Ex 75 x 40 D4S Radiata.....	3.69

<u>Mouldings:</u> (per lin metre)	
10mm Dowell.....	N/A.
28mm Rimu Scotia.....	2.50
60 x 10 Bevel edged rimu architrave.....	2.31
60 x 12 Bevel edged MDF architrave.....	N/A.

<u>Fencing Timber:</u> (each)	
4.8m 75 x 50 H3 RS Radiata rails.....	9.68
2.7m 125 x 75 H4 RS Radiata posts.....	14.65
1.8m 150 x 12 H3 RS Radiata palings.....	1.66.

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: Jarrah

	Excellent . . . . .	Poor	<u>Comments</u>			
	(5)	(4)	(3)	(2)	(1)	
Staff Courtesy:						<div>4</div>
Prompt Assistance:						<div>4</div>
Knowledgeable Staff:						<div>4</div>
Parking Availability:						<div>4</div>
Good Timber Range:						<div>5</div>
Hardware Sales:						Y(N) Builder's Hardware Next Door.
Wallboard Sales:						Y(N) " " " "
Roof Truss Manufacture:						Y(N)
Free Advice Brochures:						(Y)N
Trailer Availability:						(Y)N
Delivery:						(Y)N min \$20.00 , \$20.00 /m <sup>3</sup>

8.00 - 4.30.

8.00 - 12.00 ..

## Survey - Presentation & Promotion

Company: Jarrah

### Presentation:

Excellent . . . . . Poor

(5) (4) (3) (2) (1)

Comments

Presentation of Staff:

3

Tidyness of Grounds:

3

Location of Yard:

4

Layout of Yard:

4

Presentation of Timber:

3

Labelling of Prices:

4

### Promotion:

Use of Newspaper Advertising: ☒ Y ☐ N

Use of Mail Advertising: ☐ Y ☒ N

Use of Radio Advertising: ☒ Y ☐ N

Use of Television Advertising: ☐ Y ☒ N

Sale Items: ☒ Y ☐ N T & G. Decking. Framing. Fencing.

Trade Discount ☒ Y ☐ N 10% on cash or trade

## Survey - Products

Company: John Edmond

### Framing Timber: (per lin metre)

	PRICE	
100 x 50 H1 P/G No.1 Radiata.....	3.33	
100 x 50 BA P/G Rimu.....	N/A.	
100 x 25 RS H3 Radiata.....	1.88.	
300 x 100 RS NZ Oregon.....	25.54	
Ex 200 x 25 PP Fascia.....	10.29.	
150 x 25 Bevel back Radiata Weatherboard.....	5.06.	CLEAR.

### Finishing Timber: (per lin metre)

Ex 150 x 25 DA D4S Rimu.....	5.52
Ex 150 x 25 D4S Radiata.....	4.16.
Ex 75 x 40 DA D4S Rimu.....	3.90.
Ex 75 x 40 D4S Radiata.....	3.03

### Mouldings: (per lin metre)

10mm Dowell.....	0.68.
28mm Rimu Scotia.....	3.17.
60 x 10 Bevel edged rimu architrave.....	2.95.
60 x 12 Bevel edged MDF architrave.....	8.46 / 5.0m $\Rightarrow$ 1.70/m.

### Fencing Timber: (each)

4.8m 75 x 50 H3 RS Radiata rails.....	8.16.
2.7m 125 x 75 H4 RS Radiata posts.....	14.87.
1.8m 150 x 12 H3 RS Radiata palings.....	1.60.

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Presentation & Promotion

Company: John Edmond

### Presentation:

Excellent . . . . . Poor

(5) (4) (3) (2) (1)

Comments

Presentation of Staff:

5

Tidyness of Grounds:

4

Location of Yard:

4

Layout of Yard:

5

Presentation of Timber:

5

Labelling of Prices:

4

### Promotion:

Use of Newspaper Advertising: (Y/N)

Use of Mail Advertising: (Y/N)

Use of Radio Advertising: (Y/N)

Use of Television Advertising: (Y/N)

Sale Items: (Y/N)

Trade Discount (Y/N)

Hours: 7.30 - 5.30 m-F  
8.00 - 4.00 Sat.

## Survey - Service

Company: John Edmond

	Excellent . . . . .	Poor	<u>Comments</u>			
	(5)	(4)	(3)	(2)	(1)	
Staff Courtesy:		4				
Prompt Assistance:		4				
Knowledgeable Staff:		4				
Parking Availability:		4				
Good Timber Range:		4				
Hardware Sales:						(Y/N)
Wallboard Sales:						(Y/N)
Roof Truss Manufacture:						Y/N
Free Advice Brochures:						(Y/N)
Trailer Availability:						(Y/N)
Delivery:						(Y/N) \$12.50/m <sup>3</sup>

## Survey - Products

Company: W.W. KEIGHLEY.

<u>Framing Timber:</u> (per lin metre)	PRICE
100 x 50 H1 P/G No.1 Radiata.....	<sup>2.03</sup> 2.03
100 x 50 BA P/G Rimu.....	<sup>1.40</sup> 1.57
100 x 25 RS H3 Radiata.....	<sup>1.42</sup> 1.60
300 x 100 RS NZ Oregon.....	<sup>17.57</sup> 19.77
Ex 200 x 25 PP Fascia..... <u>w/pine. Unprimed. (+\$1.00)</u>	<sup>6.42</sup> 7.22
150 x 25 Bevel back Radiata Weatherboard.....	<sup>3.05</sup> 3.43

<u>Finishing Timber:</u> (per lin metre)	
Ex 150 x 25 DA D4S Rimu.....	<sup>4.20</sup> 4.73
Ex 150 x 25 D4S Radiata..... <u>Treated.</u>	<sup>3.05</sup> 3.43
Ex 75 x 40 DA D4S Rimu.....	<sup>2.97</sup> 3.34
Ex 75 x 40 D4S Radiata..... <u>Treated Treated</u>	<sup>2.43</sup> 2.76

<u>Mouldings:</u> (per lin metre)	
10mm Dowell.....	N/A.
28mm Rimu Scotia.....	<sup>2.07</sup> 2.33
60 x 10 Bevel edged rimu architrave.....	<sup>2.19</sup> 2.46
60 x 12 Bevel edged MDF architrave.....	N/A.

<u>Fencing Timber:</u> (each)	
4.8m 75 x 50 H3 RS Radiata rails.....	8.83
2.7m 125 x 75 H4 RS Radiata posts.....	14.06
1.8m 150 x 12 H3 RS Radiata palings.....	1.46

\*\* Retail prices, inclusive of GST. \*\*



## Survey - Service

Company: KEIGHLEY

Excellent . . . . . Poor

Comments

(5) (4) (3) (2) (1)

Staff Courtesy:

4

Prompt Assistance:

4

Knowledgeable Staff:

4

Parking Availability:

5

Good Timber Range:

5

Hardware Sales:

Y/N - nails

Wallboard Sales:

(Y/N)

Roof Truss Manufacture:

(Y/N)

Free Advice Brochures:

(Y/N)

Trailer Availability:

(Y/N)

Delivery:

(Y/N) m<sup>3</sup>. \$12/m<sup>3</sup>

7.30 - 4.30 -

8-12

## Survey - Presentation & Promotion

Company: KEIGHLEY

Presentation:                      Excellent . . . . . Poor  
(5) (4) (3) (2) (1)                      Comments

Presentation of Staff: 4

Tidyness of Grounds: 4

Location of Yard: 3

Layout of Yard: 4

Presentation of Timber: 3

Labelling of Prices: 4

### Promotion:

Use of Newspaper Advertising: Y/N

Use of Mail Advertising: Y/N

Use of Radio Advertising: Y/N

Use of Television Advertising: Y/N

Sale Items: Y/N - Building timber. - 100x50.  
75x50  
100x25.

Trade Discount Y/N

## Survey - Products

LUMBER SPECIALTIES LTD.  
Phone 348-7002 Fax 348-7001  
P.O. Box 11211 115 Main South Road  
Christchurch, New Zealand

Company: \_\_\_\_\_

<u>Framing Timber:</u> (per lin metre)	PRICE
100 x 50 H1 P/G No.1 Radiata.....	3.66
100 x 50 BA P/G Rimu.....	2.68
100 x 25 RS H3 Radiata.....	1.69
300 x 100 RS NZ Oregon.....	23.32
Ex 200 x 25 <del>W</del> Fascia. <i>W/Pine</i> .....	7.73
150 x 25 Bevel back Radiata Weatherboard.....	3.34

<u>Finishing Timber:</u> (per lin metre)	
Ex 150 x 25 DA D4S Rimu.....	4.88
Ex 150 x 25 D4S Radiata.....	4.46
Ex 75 x 40 DA D4S Rimu.....	3.22
Ex 75 x 40 D4S Radiata.....	3.69

<u>Mouldings:</u> (per lin metre)	
10mm Dowell.....	-65 <sup>c</sup>
28mm Rimu Scotia.....	3.07
60 x 10 Bevel edged rimu architrave.....	2.57
60 x 12 Bevel edged MDF architrave.....	N/A

<u>Fencing Timber:</u> (each)	
4.8m 75 x 50 H3 RS Radiata rails.....	10.90
2.7m 125 x 75 H4 RS Radiata posts.....	18.26
1.8m 150 x 12 H3 RS Radiata palings.....	1.69

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: LUMBER SPECS.

	Excellent . . . . .	Poor	<u>Comments</u>			
	(5)	(4)	(3)	(2)	(1)	
Staff Courtesy:		<input checked="" type="checkbox"/>				
Prompt Assistance:		<input checked="" type="checkbox"/>				
Knowledgeable Staff:		<input checked="" type="checkbox"/>				
Parking Availability:			<input checked="" type="checkbox"/>			
Good Timber Range:		<input checked="" type="checkbox"/>				
Hardware Sales:						<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Wallboard Sales:						<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Roof Truss Manufacture:						<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Free Advice Brochures:						<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Trailer Availability:						<input checked="" type="checkbox"/> Y <input type="checkbox"/> N
Delivery:						<input checked="" type="checkbox"/> Y <input type="checkbox"/> N min \$22.00 → 2 cubic metres. \$12 / cubic m over \$22.00
M-F 8.00-5.00.						
Sat 8.00-12.00.						

## Survey - Presentation & Promotion

Company: LUMBER SPECS.

Presentation:                      Excellent . . . . . Poor  
(5) (4) (3) (2) (1)                      Comments

Presentation of Staff:

Tidyness of Grounds:

Location of Yard:

Layout of Yard:

Presentation of Timber:

Labelling of Prices:

### Promotion:

Use of Newspaper Advertising: ☒ Y ☐ N

Use of Mail Advertising: ☒ Y ☐ N

Use of Radio Advertising: ☒ Y ☐ N

Use of Television Advertising: ☒ Y ☐ N

Sale Items:                      Y/N Framing, Gypsum Timber.

Trade Discount                      Y/N

## Survey - Products

Company: M<sup>c</sup>Vicar's Ferry Rd.

### Framing Timber: (per lin metre)

	PRICE
100 x 50 H1 P/G No.1 Radiata.....	2.20 s.
100 x 50 BA P/G Rimu.....	N/A
100 x 25 RS H3 Radiata.....	1.74
300 x 100 RS NZ Oregon.....	28.84
Ex 200 x 25 PP Fascia.....	7.22
150 x 25 Bevel back Radiata Weatherboard.....	4.04

### Finishing Timber: (per lin metre)

Ex 150 x 25 DA D4S Rimu.....	5.49
Ex 150 x 25 D4S Radiata.....	3.49 v/r
Ex 75 x 40 DA D4S Rimu.....	3.94
Ex 75 x 40 D4S Radiata.....	2.89 v/r

### Mouldings: (per lin metre)

10mm Dowell.....	.77
28mm Rimu Scotia.....	2.73
60 x 10 Bevel edged rimu architrave.....	3.24
60 x 12 Bevel edged MDF architrave.....	1.57

### Fencing Timber: (each)

4.8m 75 x 50 H3 RS Radiata rails.....	8.90 s
2.7m 125 x 75 H4 RS Radiata posts.....	11.80 s
1.8m 150 x 12 H3 RS Radiata palings.....	1.50 p.s

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: McVicar's Ferry Rd

Excellent . . . . . Poor

Comments

(5) (4) (3) (2) (1)

Staff Courtesy:

4

Prompt Assistance:

4

Knowledgeable Staff:

4

Parking Availability:

2

Good Timber Range:

4

Hardware Sales:

Y/N

Wallboard Sales:

Y/N

Roof Truss Manufacture:

Y/N

Free Advice Brochures:

Y/N

Trailer Availability:

Y/N

Delivery:

Y/N \$10.00. flat rate.

Hours: 7.30 - 5.00  
8 - 12.00.

## Survey - Presentation & Promotion

Company: McVicar's Ferry Rd.

Presentation:            Excellent . . . . . Poor

(5)    (4)    (3)    (2)    (1)

Comments

Presentation of Staff:

3

Tidyness of Grounds:

3

Location of Yard:

3

Layout of Yard:

3

### Presentation of Timber:

3

### Labelling of Prices:

4

Promotion:

Use of Newspaper Advertising: Y/N

Use of Mail Advertising: (Y/N with statements.

Use of Radio Advertising: (Y/N)

Use of Television Advertising: Y (N) not recently.

Sale Items: ☒ Y ☐ N

Trade Discount ☒ Y ☐ N



## Survey - Products

Company: McVicar's Cranford St.

<u>Framing Timber:</u> (per lin metre)	PRICE
100 x 50 H1 P/G No.1 Radiata.....	2.20.
100 x 50 BA P/G Rimu.....	N/A.
100 x 25 RS H3 Radiata.....	1.64.
300 x 100 RS NZ Oregon.....	28.84.
Ex 200 x 25 PP Fascia.....	N/A.
150 x 25 Bevel back Radiata Weatherboard.....	4.04.

<u>Finishing Timber:</u> (per lin metre)	
Ex 150 x 25 DA D4S Rimu.....	5.45.
Ex 150 x 25 D4S Radiata.....	4.04.
Ex 75 x 40 DA D4S Rimu.....	3.96.
Ex 75 x 40 D4S Radiata.....	2.89.

<u>Mouldings:</u> (per lin metre)	
10mm Dowell.....	0.77.
28mm Rimu Scotia.....	2.73.
60 x 10 Bevel edged rimu architrave.....	3.24.
60 x 12 Bevel edged MDF architrave.....	1.70.

<u>Fencing Timber:</u> (each)	
4.8m 75 x 50 H3 RS Radiata rails.....	1.85/m.
2.7m 125 x 75 H4 RS Radiata posts.....	11.50.
1.8m 150 x 12 H3 RS Radiata palings.....	1.50.

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: McVicar's Cranford St.

Excellent . . . . . Poor

Comments

(5) (4) (3) (2) (1)

Staff Courtesy:

Prompt Assistance:

Knowledgeable Staff:

Parking Availability:

Good Timber Range:

Hardware Sales:

☒ Y ☐ N

Wallboard Sales:

☒ Y ☐ N

Roof Truss Manufacture:

☒ Y ☐ N

Free Advice Brochures:

☒ Y ☐ N

Trailer Availability:

☒ Y ☐ N

Delivery:

☒ Y ☐ N \$11.00. incl.

7.30-5.30

8-4 Sat & Sun.

## Survey - Presentation & Promotion

Company: McVicar's Cranford St.

Presentation:                      Excellent . . . . . Poor  
(5)   (4)   (3)   (2)   (1)                      Comments

Presentation of Staff:

Tidyness of Grounds:

Location of Yard:

Layout of Yard:

Presentation of Timber:

Labelling of Prices:

### Promotion:

Use of Newspaper Advertising: ☒ Y ☐ N

Use of Mail Advertising:                      Y/N

Use of Radio Advertising:                      Y/N

Use of Television Advertising:                      Y/N

Sale Items: ☒ Y ☐ N

Trade Discount ☒ Y ☐ N

## Survey - Products

Company: Timber Supplies LTD.

<u>Framing Timber:</u> (per lin metre)	PRICE
100 x 50 H1 P/G No.1 Radiata.....	3.30
100 x 50 BA P/G Rimu.....	2.64
100 x 25 RS H3 Radiata.....	1.96
300 x 100 RS NZ Oregon.....	25.50
Ex 200 x 25 PP Fascia.....	9.22
150 x 25 Bevel back Radiata Weatherboard.....	3.79

<u>Finishing Timber:</u> (per lin metre)	
Ex 150 x 25 DA D4S Rimu.....	5.42
Ex 150 x 25 D4S Radiata.....	5.42
Ex 75 x 40 DA D4S Rimu.....	3.58
Ex 75 x 40 D4S Radiata.....	3.58

<u>Mouldings:</u> (per lin metre)	
10mm Dowell.....	<del>0.66</del> 74
28mm Rimu Scotia.....	2.64
60 x 10 Bevel edged rimu architrave.....	2.51
60 x 12 Bevel edged MDF architrave.....	N/A

<u>Fencing Timber:</u> (each)	
4.8m 75 x 50 H3 RS Radiata rails.....	8.00
2.7m 125 x 75 H4 RS Radiata posts.....	11.50
1.8m 150 x 12 H3 RS Radiata palings.....	1.30

\*\* Retail prices, inclusive of GST. \*\*

## Survey - Service

Company: Timber Supplies

Excellent . . . . . Poor

Comments

(5) (4) (3) (2) (1)

Staff Courtesy:

3

Prompt Assistance:

3

Knowledgeable Staff:

4

Parking Availability:

4

Good Timber Range:

4

Hardware Sales:

Y/N - Fasteners; nails, nail plates etc.

Wallboard Sales:

Y/N

Roof Truss Manufacture:

Y/N

Free Advice Brochures:

Y/N

Trailer Availability:

Y/N

Delivery:

Y/N \$15.00 min + \$10.00 / m<sup>3</sup> + GST

M-F 7.30 - 5.00

Sat. 8-4

## Survey - Presentation & Promotion

Company: Timber Supplies.

Presentation:                      Excellent . . . . . Poor  
(5)   (4)   (3)   (2)   (1)                      Comments

Presentation of Staff:

3

Tidyness of Grounds:

4

Location of Yard:

4

Layout of Yard:

4

Presentation of Timber:

4

Labelling of Prices:

4

Promotion:

Use of Newspaper Advertising: Y/N

Use of Mail Advertising: Y/N

Use of Radio Advertising: Y/N

Use of Television Advertising: Y/N

Sale Items: Y/N

Trade Discount Y/N

## Appendix II - Data Analysis

Following are the calculations used in preparing rankings for price and for service/presentation.

# APPENDIX 2 Price Analysis

P/maier	1	2	3	4	5	6	7	8	9	AVERAGE	STD DEV	AV+5D
3.97	1.57	4.08	2.63	3.33	2.03	3.66	2.20	2.20	3.30	2.90	.88	3.78
3.02	1.40	1.74	1.80	-	1.57	2.68	-	-	2.54	2.12	.64	2.76
1.88	2.80	1.94	1.69	1.88	1.60	1.69	1.74	1.64	1.96	1.88	.35	2.23
32.77	29.13	25.28	21.87	25.54	19.77	23.32	28.84	28.84	25.50	26.09	3.88	29.97
8.54	8.94	8.28	-	10.29	7.22	7.73	7.22	-	9.22	8.43	1.06	9.49
4.11	3.31	4.26	3.71	5.06	3.43	3.34	4.04	4.04	3.79	3.91	.53	4.43
3.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42	5.26	.34	5.60
4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42	4.52	.77	5.29
4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58	3.71	.38	4.08
4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58	3.56	.66	4.22
.90	.83	.95	-	.68	-	.65	.77	.77	.74	.79	.10	.89
2.97	2.86	2.97	2.50	3.17	2.33	3.07	2.73	2.73	2.64	2.80	.26	3.06
3.04	2.64	2.76	2.31	2.95	2.46	2.57	3.24	3.24	2.51	2.77	.33	3.10
2.03	1.85	1.90	-	1.70	-	-	1.57	1.70	-	1.79	.17	1.96
7.90	8.40	11.94	9.68	8.16	8.83	10.90	8.90	8.90	8.00	9.16	1.32	10.49
11.15	11.50	17.90	14.65	14.87	14.06	18.26	11.80	11.50	11.50	13.72	2.70	16.42
1.35	1.23	2.08	1.66	1.60	1.46	1.69	1.50	1.50	1.30	1.54	.24	1.78



Product Segmentation;

1) New Home Construction

P/maker	1	2	3	4	5	6	7	8	9	AVERAGE	STD DEV	AV+SD
3.97	1.57	4.08	2.63	3.33	2.03	3.66	2.20	2.20	3.30	2.90	.88	3.78
3.02	1.40	1.74	1.80	-	1.57	2.68	-	-	2.64	2.12	.64	2.76
1.88	2.80	1.94	1.69	1.88	1.60	1.69	1.74	1.64	1.96	1.88	.35	2.23
32.77	29.13	25.28	21.87	25.54	19.77	23.32	28.84	28.84	25.50	26.09	3.88	29.97
8.54	8.94	8.28	-	10.29	7.22	7.73	7.22	-	9.22	8.43	1.06	9.49
4.11	3.31	4.26	3.71	5.06	3.43	3.34	4.04	4.04	3.79	3.91	.53	4.43
5.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42	5.26	.34	5.60
4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42	4.52	.77	5.29
4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58	3.71	.38	4.08
4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58	3.56	.66	4.22
.90	.83	.95	-	.68	-	.65	.77	.77	.74	.79	.10	.89
2.97	2.86	2.97	2.50	3.17	2.33	3.07	2.73	2.73	2.64	2.80	.26	3.06
3.04	2.64	2.76	2.31	2.95	2.46	2.57	3.24	3.24	2.51	2.77	.33	3.10
2.03	1.85	1.90	-	1.70	-	-	1.57	1.70	-	1.79	.17	1.96
7.90	8.40	11.94	9.68	9.16	8.83	10.90	8.90	8.90	8.00	9.16	1.32	10.49
11.15	11.50	17.90	14.65	14.87	14.06	18.26	11.80	11.50	11.50	13.72	2.70	16.42
1.35	1.23	2.08	1.66	1.60	1.46	1.69	1.50	1.50	1.30	1.54	.24	1.78
Total	102.61	95.88	104.65	95.84	79.02	95.81	90.36	83.38	91.10	94.93	14.62	109.55

2) Renovation

P/maker	1	2	3	4	5	6	7	8	9	AVERAGE	STD DEV	AV+SD
3.97	1.57	4.08	2.63	3.33	2.03	3.66	2.20	2.20	3.30	2.90	.88	3.78
3.02	1.40	1.74	1.80	-	1.57	2.68	-	-	2.64	2.12	.64	2.76
8.54	8.94	8.28	-	10.29	7.22	7.73	7.22	-	9.22	8.43	1.06	9.49
4.11	3.31	4.26	3.71	5.06	3.43	3.34	4.04	4.04	3.79	3.91	.53	4.43
5.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42	5.26	.34	5.60
4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42	4.52	.77	5.29
4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58	3.71	.38	4.08
4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58	3.56	.66	4.22
.90	.83	.95	-	.68	-	.65	.77	.77	.74	.79	.10	.89
2.97	2.86	2.97	2.50	3.17	2.33	3.07	2.73	2.73	2.64	2.80	.26	3.06
3.04	2.64	2.76	2.31	2.95	2.46	2.57	3.24	3.24	2.51	2.77	.33	3.10
2.03	1.85	1.90	-	1.70	-	-	1.57	1.70	-	1.79	.17	1.96
Total	47.56	42.82	45.51	43.79	33.30	39.95	37.58	31.00	42.84	42.55	6.12	48.67

### 3) Home Handyman

P/maker	1	2	3	4	5	6	7	8	9	AVERAGE	STD DEV	Av+SD	
3.97	1.57	4.08	2.63	3.33	2.03	3.66	2.20	2.20	3.30	2.90	.88	3.78	
3.02	1.40	1.74	1.80	-	1.57	2.68	-	-	2.64	2.12	.64	2.76	
1.88	2.80	1.94	1.69	1.88	1.60	1.69	1.74	1.64	1.96	1.88	.35	2.23	
4.11	3.31	4.26	3.71	5.06	3.43	3.34	4.04	4.04	3.79	3.91	.53	4.43	
5.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42	5.26	.34	5.60	
4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42	4.52	.77	5.29	
4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58	3.71	.38	4.08	
4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58	3.56	.66	4.22	
.90	.83	.95	-	.68	-	-	.77	.77	.74	.71	.10	.81	
2.97	2.86	2.97	2.50	3.17	2.33	3.07	2.73	2.73	2.64	2.80	.26	3.06	
3.04	2.64	2.76	2.31	2.95	2.46	2.57	3.24	3.24	2.51	2.77	.33	3.10	
2.03	1.85	1.90	-	1.70	-	-	1.57	1.70	-	1.79	.17	1.96	
7.90	8.40	11.94	9.68	8.16	8.83	10.90	8.90	8.90	8.00	9.16	1.32	10.49	
11.15	11.50	17.90	14.65	14.87	14.06	18.26	11.80	11.50	11.50	13.72	2.70	16.42	
1.35	1.23	2.08	1.66	1.60	1.46	1.69	1.50	1.50	1.30	1.54	.24	1.78	
Total	61.30	57.81	71.09	56.86	60.01	52.03	64.11	54.30	54.54	56.38	60.34	9.67	70.01

### 4) Industrial

P/maker	1	2	3	4	5	6	7	8	9	AVERAGE	STD DEV	Av+SD	
3.97	1.57	4.08	2.63	3.33	2.03	3.66	2.20	2.20	3.30	2.90	.88	3.78	
3.02	1.40	1.74	1.80	-	1.57	2.68	-	-	2.64	2.12	.64	2.76	
32.77	29.13	25.28	21.87	25.54	19.77	23.32	28.84	28.84	25.50	26.09	3.88	29.97	
5.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42	5.26	.34	5.60	
4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42	4.52	.77	5.29	
4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58	3.71	.38	4.08	
4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58	3.56	.66	4.22	
.90	.83	.95	-	.68	-	.65	.77	.77	.74	.79	.10	.89	
2.97	2.86	2.97	2.50	3.17	2.33	3.07	2.73	2.73	2.64	2.80	.26	3.06	
3.04	2.64	2.76	2.31	2.95	2.46	2.57	3.24	3.24	2.51	2.77	.33	3.10	
2.03	1.85	1.90	-	1.70	-	-	1.57	1.70	-	1.79	.17	1.96	
Total	67.68	59.70	58.25	47.34	53.98	42.42	52.20	55.16	55.80	55.33	56.30	8.42	64.71

### 5) Factory/Joinery

P/maker	1	2	3	4	5	6	7	8	9	Average	Std dev	Av+sd
5.74	5.42	5.06	4.88	5.52	4.73	4.88	5.49	5.45	5.42	5.26	.34	5.60
4.95	5.70	5.10	4.45	4.16	3.43	4.46	3.49	4.04	5.42	4.52	.77	5.29
4.19	3.57	4.19	3.21	3.90	3.34	3.22	3.94	3.94	3.58	3.71	.38	4.08
4.10	4.73	4.22	3.69	3.03	2.76	3.69	2.89	2.89	3.58	3.56	.66	4.22
.90	.83	.95	-	.68	-	.65	.77	.77	.74	.79	.10	.89
Total	19.88	20.95	18.52	14.23	17.25	14.36	17.22	17.52	17.07	17.53	1.27	18.80

APPENDIX 2            Service and Presentation

	P/mkr	1	2	3	4	5	6	7	8	9	Average
TOTAL	50	43	45	45	51	47	44	41	40	45	45.1
Staff Presentation	5	3	3	3	5	4	4	3	2	3	3.5
Staff Courtesy	4	4	4	4	4	4	4	4	3	3	3.8
Prompt Assistance	4	4	4	4	4	4	4	4	3	3	3.8
Knowledgeable Staff	3	4	4	4	4	4	4	4	4	4	3.9
Subtotal	16	15	15	15	17	16	16	15	12	13	15
Timber Range	4	3	4	5	4	5	4	4	4	4	4.1
Timber Presentation	4	4	3	3	5	3	3	3	3	4	3.5
Labelling	4	2	4	4	4	4	3	4	3	4	3.6
Subtotal	12	9	11	12	13	12	10	11	10	12	11.2
Location	4	4	3	4	4	3	4	3	4	4	3.7
Layout	4	4	4	4	5	4	3	3	3	4	3.8
Tidyness	4	5	3	3	4	4	4	3	2	4	3.6
Parking Availability	5	2	4	4	4	5	3	2	4	4	3.7
Subtotal	17	15	14	15	17	16	14	11	13	16	14.8
Support Services	5	4	5	3	4	3	4	4	5	4	4.1

N.B. Support services includes - Hardware Sales  
                                           - Wallboard Sales  
                                           - Roof truss manufacture  
                                           - Free Advice Brochures  
                                           - Free loan trailers  
                                           - Delivery